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ABSTRACT

The literature on transformative learning theory and the literature on cross-cultural adaptation were analyzed to identify links between both bodies of literature. The notion of an unexpected phenomenon that influences individuals residing in an unfamiliar culture was shown to be a common thread linking the two bodies of literature. Transformative learning theory called this phenomenon a trigger event, whereas cross-cultural adaptation theory called it culture shock. Eight studies combining both fields were identified. The eight studies differed from one another from the following standpoints: (1) their purpose; (2) the need for the study; (3) the criteria used to select participants; (4) their methodology, and (5) the length of the sojourn in the host culture. The eight studies shared several important similarities as follows: (1) they all referred to disorienting dilemmas that sparked a perspective transformation; (2) the use of nonreflective thinking or reflective thinking was pertinent to each study; (3) they all indicated that cross-cultural learning involved some aspect of transformation; and (4) they all discussed the role of supporting relationships within the context of transformative learning theory. The importance of identifying other theories and bodies of literature with relevance to transformative learning theory was emphasized. (20 references) (MN)

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Trigger Event meets Culture Shock: Linking the Literature of Transformative Learning Theory and Cross-Cultural Adaptation

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The purpose of this exploration was to identify the links between the literature bases of transformative learning theory and cross-cultural adaptation. Eight extant studies combining these two areas of literature were examined to find similarities and differences.

Introduction

The purpose of this paper is two-fold: (1) to identify the links between the literature bases of transformative learning theory and cross-cultural adaptation and (2) to discuss the eight studies that combined these two fields of research. The original research for this paper was conducted as part of the literature review for the dissertation: *Cultural mentors: Exploring the role of relationships in the adaptation and transformation of women educators who go overseas to teach* (Lyon 2001a). In the study, I examined the period of time that the participants spent overseas through the lens of transformative learning. They experienced many forms of culture shock that led me to coin the term *culture trigger* for a trigger event in a host culture. I also examined the periods of time before leaving for overseas and upon re-entry. Subsequently, I coined the terms *departure trigger* and *re-entry trigger* to indicate a disorienting dilemma in those chronological contexts. This implied that the trigger event must be looked at in both the situational and chronological contexts. For the literature review, I examined transformative learning theory and cross-cultural adaptation, especially publications about culture shock. Prior to my research, I discovered seven studies that sought out links between the two literature bases. In this paper, I discuss the major link between transformative learning theory and cross-cultural adaptation and subsequent links in the eight extant studies combining these two areas of research.

Literature

Mezirow (1978a) initiated transformative learning theory after his study on re-entry women in college. Mezirow's (1978b) writings on perspective transformation point out, "Transformation in meaning perspective is precipitated by life's dilemmas which cannot be resolved by simply acquiring more information, enhancing problem solving skills, or adding to one's competencies" (p.108). In his later works, Mezirow (1999) defines transformation theory by saying it is a learning process by which the subject moves from an unexamined way of thinking to a more examined and critically reflective way. This leads to a more dependable way of interpreting meaning. It is through the lens of transformative learning theory that I first examined the experiences of women educators overseas.

The second area of literature is cross-cultural learning that includes the often-mentioned topic of culture shock. Culture shock is, "Primarily a set of emotional reactions to the loss of perceptual reinforcements from one's own culture to new stimuli which have little or no meaning and to the misunderstanding of new and diverse experiences" (Adler, 1975, p.13). It is my impression that the term culture shock immediately gives a negative overtone to the overseas experience. This was not the case with the women in my study. Oberg (1960) conducted a study

on culture shock that is cross-referenced yet today. The topic of culture shock is pursued in the writings of Gullahorn and Gullahorn (1963) and Church (1982). The idea of culture shock permeates most of the literature of cross-cultural adaptation.

Linking Trigger Events and Culture Shock

After reviewing the literature bases, I perceived an initial link surfacing from both bodies of research. This link is an unexpected phenomenon that influences individuals residing in an unfamiliar culture. Transformative learning theory calls this happening a trigger event, and in cross-cultural adaptation it is culture shock. There is much discussion in the literature of transformative learning theory about a *disorienting dilemma* that precipitates a perspective transformation. Mezirow (1990) states, "Perspective transformation occurs in response to an externally imposed disorienting dilemma" (p. 3). Taylor's (1989) definition of disorienting dilemmas or *trigger events* is, "Incidents or experiences that disturb the individual's current view of reality (...). They are disorienting dilemmas; they are experiences or events which demand attention and cause the individual to stop and think" (p. 227). Clark (1993) found two kinds of disorienting dilemmas among adults who identified a learning experience that changed their lives. The first type is the trigger event, and the second is an *integrating circumstance* that provides a missing piece in a person's life. The integrating circumstance is a build-up of events that offers an individual an opportunity to make meaning from an experience. Lee (1997) notes there is an *immediate reaction* after an *initiator*. This trigger event in the transformative learning experience is a key part of culture shock and adjustment to a host culture. Thus, there is a form of disorienting dilemma in both literature bases, but I found that this form could not be defined with traditional terminology from either literature base.

Eight Studies

Eight extant studies (Harper, 1994; Holt, 1994; Kennedy, 1994; Lee, 1997; Lyon, 2001; Taylor, 1993; Temple, 1999; Whalley, 1995) further combine and explore both transformative learning theory and cross-cultural adaptation. Taylor was the forerunner of this research. In order to identify further links between these specific studies, I examined their dissimilar and similar characteristics. The studies differed in five areas: (1) the purpose of the study, (2) the need for the study, (3) the criteria used for participant selection, (4) the methodology, and (5) the length of the sojourn in the host culture.

purpose. The purposes for all eight studies were based within the broad realm of perspective transformation. However, three researchers (Holt, 1994; Kennedy 1994; Taylor, 1993) sought to provide a model for cross-cultural learning. The purpose of the Whalley study was close to this purpose because it sought to develop a theory of cross-cultural learning. The Harper study looked further at the processes of change within the context of international migration. Temple studied perspective transformation specifically in relationship to conversion to Christianity. The Lee study explored the role of cultural values in the interpretation of significant life experience by Taiwanese Chinese. Lyon (2001a) investigated the role of relationships in the adaptation and transformation of women educators working overseas.

need. Four researchers (Holt, 1994; Kennedy, 1994; Taylor, 1993; Whalley, 1995) emphasized a need for their studies because they would contribute tremendously to the field of international training. Lyon (2001b) provided empirical knowledge specifically to American

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educators in adult and higher education who are planning on working overseas. As a result, trainers know more about the learning process involved in a cross-cultural assignment. In contrast, many previous studies in cross-cultural learning dealt only with the traits needed to go overseas (Smith, 1966). Whalley emphasized understanding such experiences from the stance of intercultural communication. Lee felt the need to explore the cultural context of an experience. Temple wanted church workers to understand the Christian conversation of Chinese immigrants. Kennedy also suggested one of the main reasons for her study was to have a common link between participants; consequently, they could talk about their time in another culture.

participant selection and methodology. These studies were especially varied as to both the participant selection criteria and the methodology. All studies included participants who were over the age of twenty, except for the Whalley (1995) study of high school age students. Holt (1994) selected male participants, while the other researchers included both females and males. Lyon (2001a) interviewed thirteen women who varied in age from twenty-two to seventy-four. The participants of the Lee (1997) study were between the ages of twenty-six and forty-four. Thus, varying age and gender groups were used to explore perspective transformation. The number of participants used in the studies ranged from twenty-five used by Whalley to Harper's (1994) case study of one person. Several studies (Holt, 1994; Lee, 1997; Lyon, 2001a; Taylor, 1993; Temple, 1999) used qualitative, in-depth interviews for six to twelve participants. Kennedy used a combination of interviews and survey type questionnaires. Whalley employed a most unique method because the students wrote and analyzed their own cultural journals.

time in host culture. The length of time the participants spent in the host culture and the reasons for going overseas were the greatest variables among all the studies. Russians and Latvians tourists in Kennedy's study (1994) spent only two weeks in the United States. Her study also involved people who had been overseas as educators in the Peace Corps, in addition to a group of Americans from a post-secondary institution who went on a short-term study tour to the Czech Republic. The participants in the Lee (1997) study were permanent immigrants in the United States. Students in the Whalley (1995) study went from Canada to Japan for a year, and those from Japan went to Canada for three months. The participants in the Holt (1994) study spent at least two years in a host culture, but they went from Greece to several countries. The twelve participants in Taylor's (1993) study also went overseas for at least two years, but to a variety of destinations in the world. Lyon (2001a) interviewed women who sojourned in ten different countries for at least six months.

Similarities

Further links between the literature bases were found in four categories of similarities among the above-mentioned studies: (1) the role of the disorienting dilemma, (2) the use of reflective or non-reflective thinking by the participants, and (3) additions to understanding transformative learning in cross-cultural settings, and (4) the role of relationships in transformations.

disorienting dilemma. All of the studies referred to disorienting dilemmas that sparked a perspective transformation. However, Kennedy (1994) found not all individuals experienced culture shock. If they experienced culture shock, they did not pass through the usual stages seen in the literature on cross-cultural adaptation (Gullahorn et al, 1963). Taylor (1993) and Holt

(1994) found the disorienting dilemma occurs after the initial immersion period in a culture begins to wear off. Taylor also found that the process of intercultural competency had five stages; sometimes they were recursive. In other words, a disorienting dilemma could happen beyond the first stage of an overseas experience. Holt's participants found this disorienting dilemma happens sometime between six months and twelve months in the host country. Mira, in the Harper (1994) study, found her first six months in Canada were the happiest. Whalley (1995) discovered there is evidence that each participant experienced a disorienting dilemma to some degree, but usually it was provoked by a certain experience. Temple (1999) found all of his participants could relate a perspective transformation to an event or person. Most of these events happened after an initial phase of immersion in the new culture. Lee (1997) made a significant contribution to the field by reporting not only a trigger event, but also suggesting that it is followed by an immediate reaction. This reaction promotes a negotiation phase in the experience where support of friends and family is called on to make meaning. Lyon (2001b) linked the terms trigger event and culture shock to coin the term culture trigger. Five of the studies mention that the disorienting dilemma happens sometime during the first phase of an experience. The difference among researchers is what precipitates the dilemma and at what stage in the experience it occurs.

reflection. The use of non-reflective thinking or reflective thinking is pertinent to each study. When negotiating a perspective transformation, the participants in the Taylor (1993) study used non-reflective and reflective thinking at a stage labeled, Cognitive Orientation. The Holt (1994) study confirmed this finding. In the Harper (1994) study, Mira used critical reflection to offset the fact that she could not return to Lebanon; consequently, this helped her find a new identity as a professional person. Kennedy (1994) found those who were educated in the liberal arts were more reflective than those educated in science. Whalley (1995) found distinct use of premise and process reflection in the high school students. Even though most of the participants in the Temple (1999) study were scientists, their conversions happened mostly with non-reflective assimilative process within the context of the church. The Lee (1997) study discovered reflection took place within the context of important Chinese cultural values. The participants in the Lyon (2001a) study often did not use critical reflection to make meaning of their experiences until the time of the interview. In these studies, there is not a unifying finding that only non-reflective or only reflective thinking are used in cross-cultural learning, but both seem to have their places. The studies are alike because they find the use of one or both types of thinking during the transformative process.

transformation. In regard to transformation theory, the studies all indicated that cross-cultural learning involved some aspect of a transformation. Lee (1997) found that the process of meaning making is culturally construed, and there is a common process individuals use to interpret their experiences. Kennedy (1994) found perspective transformation occurred regardless of a participant's length of stay overseas. Three authors (Harper, 1994; Holt, 1994; Taylor, 1993) proposed a model for transformative learning. Whalley (1995) discovered learning through meaning schemes and perspectives are essential to the culture of learning. Temple (1999) determined that genuine conversion to Christianity involves a transformation. Lyon's (2001a) participants found they were transformed, most often in self-identity and self-confidence.

relationships. Within the context of transformative learning theory there is emerging discussion about the role of supporting relationships. Taylor (1993) recommended further research in the area of transformation and supporting relationships. Lyon (2001b) noted that individuals needed changing kinds of supporting relationships throughout four stages of the overseas experience. Often personal and professional relationships blurred. Holt (1994) concluded that participation in activities with the host nationals was important to adjustment. Two participants in her study married persons from the host country or a third country during their overseas sojourns. Temple (1999) emphasized the role of support that persons in the Chinese church provided during an individual's conversion. Lee (1997) discussed the role of others in a transformation at the immediate reaction stage. She noted the person experiencing trigger events needs support from others to negotiate these events. Mira, in the Harper (1994) study, realized when she could have relationships with others in Canada as a professional teacher, rather than as an immigrant, that she fit in more and found a place for herself.

Contributions of Studies

The eight studies discussed in this paper all made contributions to the fields of transformative learning theory and cross-cultural learning. The Taylor (1993) and Holt (1994) studies are similar to mine (Lyon, 2001a) because of the professional roles and lengths of stay overseas of the participants. Individuals who are heading overseas to work could read the studies and have a good vision of the learning process that takes place during such an experience. They would especially be interested in the five stages of intercultural competency as identified by Taylor. The Temple (1999) study limited its focus to a group of Christian scholars who were converted, but it does speak to the importance of their experiences and the importance of context in transformation. It shows the value of one supportive group, such as the church, to help persons negotiate transformations. The Temple study provides previously unknown knowledge for a narrower audience, those in the church who would be working with Chinese who are considering converting to Christianity. Whalley (1995) makes concrete suggestions about the role of meaning making in a cross-cultural experience. However, this study concerning high school students does not relate to my research because it is dealing with those whom I feel are not yet adult enough to go through a complete perspective transformation. Kennedy (1994) identified participants who demonstrated varied lengths of sojourns, experiences, and countries. The Harper (1994) case study is an in-depth study of one unique person. It speaks to how a self-identity is formed in a new culture through the use of perspective transformation. Each study needs to be looked at within the contexts of the participant group and the purpose for the research.

Implications and Further Questions

This research underscores new knowledge about culture shock and unexpected events that was produced by linking the literature of transformative learning theory and cross-cultural adaptation. I found that the trigger event in a host culture was a main link that should be looked at within the chronological stage of the experience. Special terms were coined to identify the disorienting dilemmas of women educators working overseas. Should researchers in adult education expand the concept of trigger event to mirror the stage of a life experience within which it occurred? Frequently, studies in the field use transformative learning theory to understand a life transition. If transformative learning theory is applicable to cross-cultural learning, as seen in the above eight studies, what are the future links between transformative

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learning theory and other bodies of literature which can be explored in the field of adult education?

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